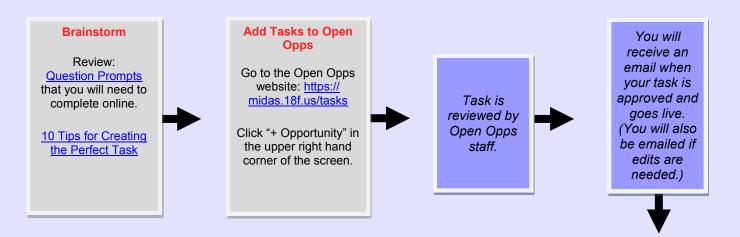
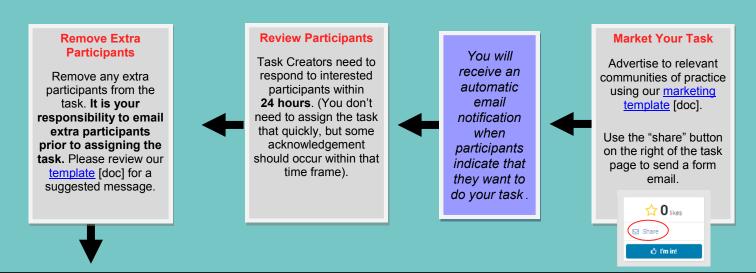


Task Creation Process

Preparation



Getting Participants



Wrapping Up

Assign Task

When you are ready to select participants, change the opportunity state to "assigned." (Box is on the right side of the task page when you are logged in).



Automatic email sent to participants, signifying their selection. You will be CC'd.

Be sure you removed extra participants or they will also receive the "you've been assigned" email!

Task Editing

Make edits if the task changes after posting.

If you are going to be out of the office, choose a colleague to be a replacement task creator (you can switch task creators anytime) or put your open task back into "draft" via the opportunity state box.

Task Archiving

If your task is not picked up within a needed timeframe, change the opportunity state to "archived."

For example, if your task needs to be done by Mar. 3rd, and nobody selects it, change the status to "archived" on Mar. 4th.

Closing Tasks

If your task has been completed, change the opportunity state to "completed."

Thank you for being a task creator!!